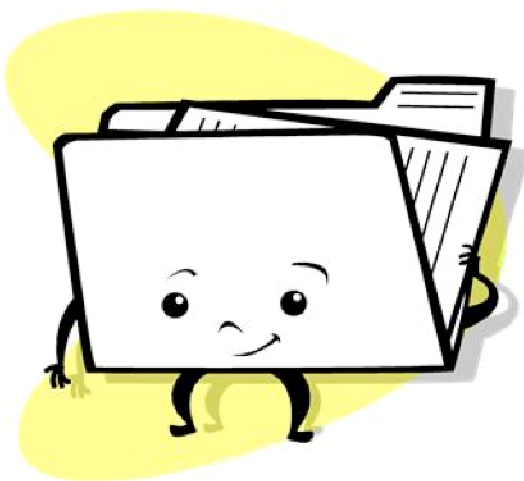


800# Interlibrary Loan & Reference Support Service

Guide to Paperwork for Interlibrary Loans



For Library Staff and Volunteers Only

1-800-261-2838

apl800@muni.org

Updated 2015

Internal ILL Paperwork

Standardized Request Form & ILL Checkout Slip

The key piece of paperwork for successful ILL service is a standardized request form, which can be used not only to take down and submit patron requests, but also to track requests through each stage of the interlibrary loan process. Although not required, it is recommended that your library use the request form provided by the 800# Service (shown on page 4) or one that incorporates similar information.

You will also want every interlibrary loan item you check out to be clearly labeled for your patron, as well as any staff or volunteers that may be responsible for accepting returns. The 800# Service provides a printable template (shown below) that can be put on loan items which arrive without external labeling.



Please note: never use adhesives or clips which might damage loan items. For ideas on how to safely attach labels see page 6 of this manual.

Internal ILL Paperwork

Standardized Request Form & ILL Checkout Slip

Front view

Patron Name: _____ Date of Request: _____	800# Interlibrary Loan & Reference Service Request Form (Library Staff/Volunteer Use Only)				
Instructions: Use a separate form for every item requested (television seasons count as one item) and file. Attach this form to the lending library's paperwork while materials are checked out to your patron, and keep this form in your files for at least 6 months after completion of request (remember to return the lending library's paperwork with the loan item). Required information is in bold .					
Title: _____ _____ _____ Author: _____ _____ _____ Format: <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Audiobook <input type="checkbox"/> CD <input type="checkbox"/> Other: _____ <div style="text-align: center; margin-top: 10px;">Additional Information:</div> Edition: _____ Year: _____ Illustrator: _____ Series: _____ Volumes: _____	Reference Question: _____ _____ _____ Would your patron like materials on this topic? Please describe the number and type of items they would like to request: _____ _____ <hr style="border-top: 1px dashed black;"/> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;">Due Date:</td> <td style="width: 50%; padding: 5px;">Patron's Due Date:</td> </tr> <tr> <td style="padding: 5px;">Renew Date:</td> <td style="padding: 5px;">Patron's Renew Date:</td> </tr> </table> ILL #: _____ Received on: _____ Returned on: _____	Due Date:	Patron's Due Date:	Renew Date:	Patron's Renew Date:
Due Date:	Patron's Due Date:				
Renew Date:	Patron's Renew Date:				

Back view

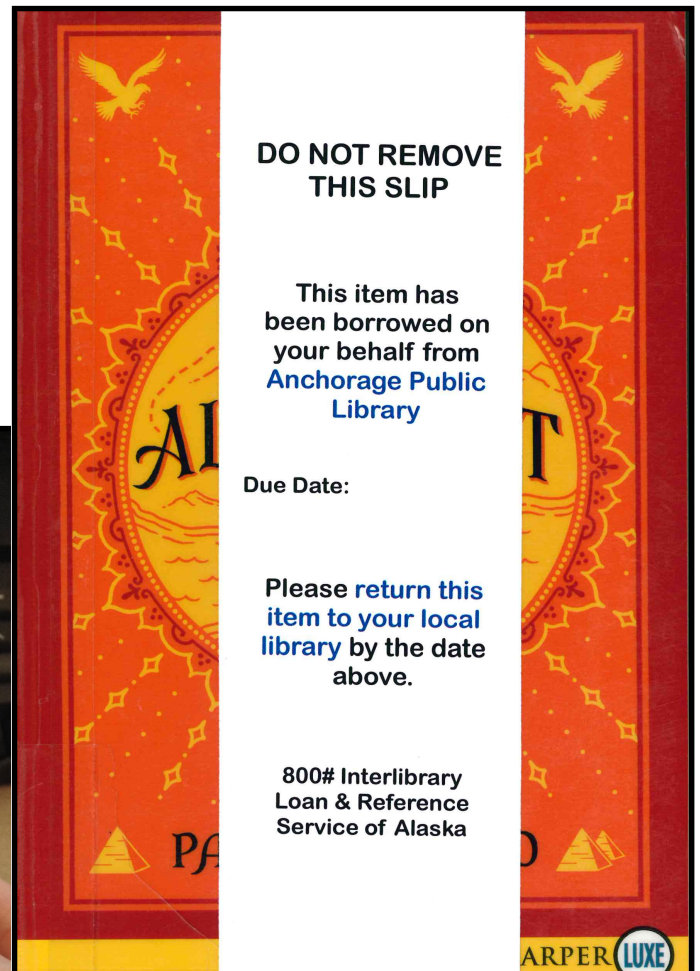
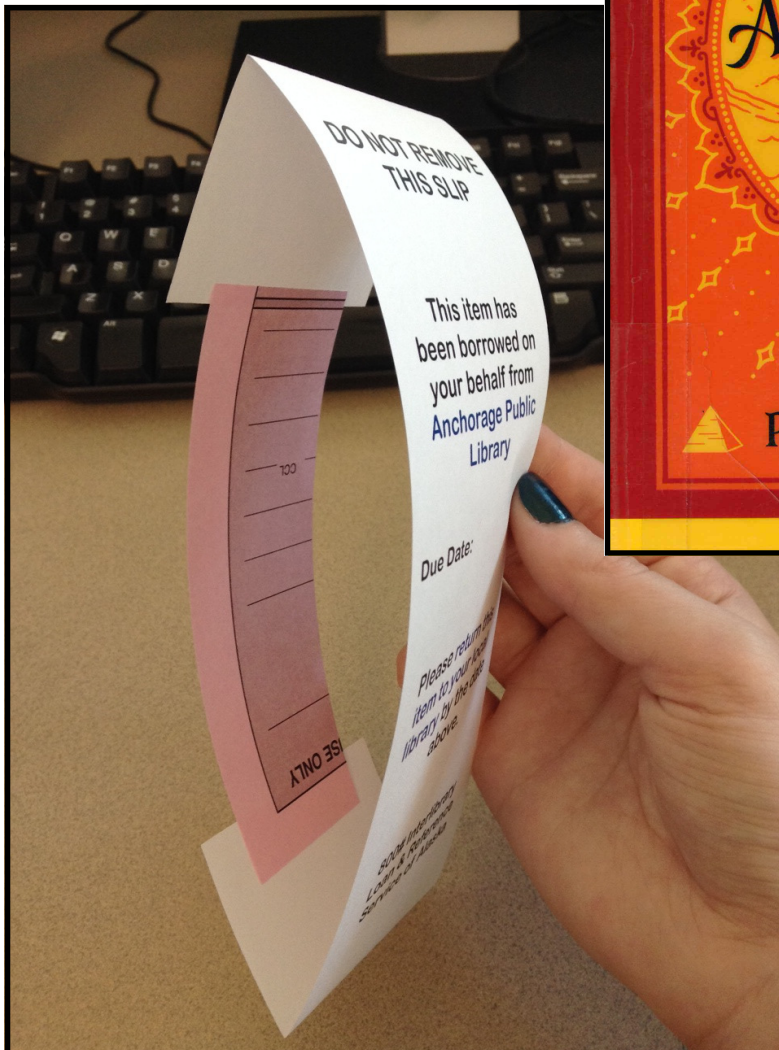
Additional Instructions: Requesting Items: Call, fax, or email the 800# with your patron's request, then file this form. Receiving Items: Call, fax, or email the 800# including the Title or ILL# of the item that has arrived. Please note that if the item is not from Anchorage Public Library (APL), you <i>must</i> include the ILL#. Checking Out Items: Calculate the patron's due date by either subtracting at least two weeks from the due date given to you by the lending library, or in the case of items from APL using the stamp indicating the length of time your patron may have the item. Contact your patron to let them know that their item has arrived. Renewing Items: Call, fax, or email the 800# with renewal requests as soon as possible. Do not contact the lending library directly. Write the new due date on your paperwork on the line given. Remember that once again you must calculate the patron's due date separately from the one given to you by the lending library. The date given to you by a lending library is the date on which they want the item to be back in their hands, so remember to account for the length of time it will take to ship back. Returning Items: Call, fax, or email the 800# with the ILL# or Title of the item you are mailing back. Pack items for return carefully, and remember to use a box for media items (as well as first class postage) and properly secure items traveling long distances. Library Rate may be used for books, but remember to account for long shipping time. Save and reuse packaging, being sure to blackout or remove all old postage. Return loan items directly to the lending library.
Phone: 1-800-261-2828 Fax: 1-907-343-2837 Email: apl800@muni.org

Paperwork from Lending Libraries

Loans from Anchorage Public Library (APL)

When an ILL item arrives from APL it will arrive with a checkout slip attached to the cover (*see below-left*). Write your patron's due date in the space provided. Please note: these slips are attached with removable tape; if they fall off or become loose please do not use regular tape directly on an item, instead use a piece of scrap paper to create a sleeve you can slide onto the cover of the book.

Never put something on a loan item that you cannot remove without leaving marks or damage!



Paperwork from Lending Libraries

Loans from Anchorage Public Library (APL)

The 800# Service Loan slip should be attached to the Standard Request Form and filed in your “Active ILL” folder. Both the “Standard Request Form” provided by the 800# Service and loan slips for APL items are half-sheets.

Note that instead of giving a set date on which the item needs to be back at APL, the slip comes with a stamp indicating the number of weeks your patron can have the item. Every loan slip comes with the 800# Service contact information, as well as a return mailing label (not shown) which can be removed from the bottom of the slip.

800# Interlibrary Loan & Reference Backup Service 6/23/2015
Anchorage Public Library- 3600 Denali St. Anchorage, AK 99503

Alaska Rural Library—Patron: **Reader, Susan B.**

The little free library book / Aldrich, Margret, 1975-

Control	Bibliographic	MARC Holdings	Call Number/Item	Bour
---------	---------------	---------------	------------------	------

<input checked="" type="checkbox"/> The little free library book - Aldrich, Margret, 1975-				
--	--	--	--	--

<input checked="" type="checkbox"/> 027 ALDRICH - AML-LL
--

2390973-1001 - 1 - NEW-BOOK - DISCARD

39095501277219 - 2 - NEW-BOOK - NONFIC-AML
--

**3 WEEKS
AFTER RECEIPT**

Questions? Call 1-800-261-2838 or Email apl800@muni.org

Paperwork from Lending Libraries

Loans via OCLC Worldshare

Not all interlibrary loan requests can be filled from the collection at Anchorage Public Library. Depending on the preferences of your library, requests can be placed at libraries in-state or nationwide through OCLC WorldShare. Facilitating Interlibrary Loan services via OCLC WorldShare is one of the primary duties of the 800# Service; items are tracked by unique numbers assigned to each loan called “ILL Numbers” which are the key piece of information the 800# Service needs to receive from you in order to properly process your interlibrary loan transactions. Unfortunately, paperwork from lending libraries varies significantly meaning you will not always find the ILL number in the same place, and other information such as patron name or the lending library’s return address may be missing entirely. The next several pages show examples of paperwork you might receive with ILL loans.

On the next page is an example of the sort of paperwork you might receive from a lending library that lends via OCLC WorldShare. It is a standard printout of the request as it exists in WorldShare and features the ILL number prominently in the top right corner below a barcode. You will also notice that there is a due date listed directly below the ILL #. This date is typically when the lending library expects to have the item back, and is *not* the due date you should give the patron.

A Note Regarding Due Dates:

When receiving Interlibrary Loan items from libraries other than APL, please remember to calculate a patron due date that will allow your library time to ship the item back before the lending library due date. For items which need to be sent out of state, it is best to give the item two weeks of shipping time to arrive back at the lending library.

Sometimes out-of-state libraries fail to account for lengthy shipping times into and out of Alaska. If subtracting two weeks from the lending library’s due date doesn’t leave your patron enough time to check out and enjoy the material (One week for A/V, 2-3 weeks for books), please email, call in, or fax a renewal request *along with* your usual receipt notification.

Contact the 800# Service to Request, Receive, Renew, and Return!

Paperwork from Lending Libraries

Loans via OCLC Worldshare

STATUS

Received/In Use

SOURCE

ILLiad

BORROWER

XYZ

LENDERS

GRN, AMH, MYG, *MEU, MNE

TYPE

Loan

REQUEST DATE

05/02/2014

RECEIVE DATE

05/13/2014

OCLC #

811592749

NEED BEFORE

07/01/2014

**DUE DATE**

06/04/2014

BIBLIOGRAPHIC INFORMATION**AUTHOR** Smith, Bessie, 1894-1937. prf**ARTICLE AUTHOR****TITLE** The complete Columbia recordings**ARTICLE TITLE****IMPRINT** [New York, N.Y.?] : Sony/Columbia/Legacy, [2012]**FORMAT** Sound Recording**ISBN****EDITION****VOLUME****NUMBER****DATE****PAGES****INTERLIBRARY LOAN INFORMATION****ALERT****AFFILIATION****COPYRIGHT** US:CCG**VERIFIED** <TN:118240><ODYSSEY:206.107.42.165/ILL>**MAX COST** OCLC IFM - 10.00 USD**SHIPPED DATE** 05/05/2014**LEND CHARGES****FAX NUMBER** (907) 343-2837**LEND RESTRICTIONS****EMAIL** amill@muni.org**BORROWER NOTES** (maxCost: \$10.00)**ODYSSEY** 206.107.42.165/ILL**ARIEL FTP****ARIEL EMAIL****BILL TO**

SAME AS ABOVE

LENDER NOTES Tax #01-6000-769 (FEIN)**BILLING NOTES** IF CHARGES ARE OTHER THAN IFM, PLEASE DO NOT SEND. THANKS.**PATRON INFORMATION****PATRON ID****PATRON NAME** **PATRON STATUS****PATRON ADDRESS****PATRON PHONE****PATRON FAX****PATRON EMAIL****PATRON DEPARTMENT****PICKUP LOCATION****SHIPPING INFORMATION****SHIP VIA** Library Mail**RETURN VIA** Library Rate**SHIP TO****RETURN TO**

Anchorage Public Library

Fogler Library ILL

3600 Denali

5729 Fogler Library, Univ. of Maine

Anchorage, AK, US 99503


Orono, ME, US 04469-5729

Paperwork from Lending Libraries

Loans via OCLC Worldshare

3 weeks use
from receipt


Name of Library Sharing with You ILL

Trans. #: 555555 

Title I'm a Book!
Author Author, Famous

Call # LIB-AK
Location FIC AUTHOR

Patron Reader, Sue
Due 6/29/2014

ILL# 995500555 


MaxCost: 0.00IFM

Loaned To:
YOU- Your Library Consortium- ILL
P.O. Box 123
Your Town, AK 99000
-

ILL Office Hours: Mon-Fri., 9am-3pm
Phone: (907) 555-5555


NO RENEWALS

Interlibrary Loan

Trans. #: 555555 

Title I'm a Book!
Author Author, Famous
Call # LIB-AK FIC AUTHOR

Patron Reader, Sue
Due 6/29/2014

ILL# 995500555 

Loaned To: YOU- Your Library- ILL

ILL Office Hours: Mon.-Fri., 9am-3pm
Phone: (907) 555-5555

Some libraries use an interlibrary loan management program called ILLiad to process and track loans. ILLiad allows libraries to easily create loan slips (*see right*) as well as labels to attach to the covers of loans (*see above*). Libraries using ILLiad may use either or both forms of paperwork.

Keeping Track of it All

Recommendations for Filing

NEW REQUESTS/PENDING ILL

Once a request has been submitted to the 800# Service, the “Standard Request Form” should be filed in a folder labeled “Pending ILL” organized alphabetically by the title of the item requested. This is done to ensure that you can find the form regardless of what information arrives with the item—the lending library’s paperwork may or may not include your patron’s name, but the item itself should at least have its own name on it!

RECEIVED/ACTIVE REQUESTS

When an ILL item arrives at your library, pull the standard request form from your “Pending ILL” folder and attach any loose paperwork that may have come from the lending library. Update the paperwork to include information such as the Lending Library due date, patron due date, and ILL number if applicable.

If a requested item arrives with paperwork attached to the item itself, do not remove it; if the attached paperwork shows the Lending Library due date, mark it out so that your patron will only see the date you want it to be returned to your library.

After contacting the 800# Service and the patron who placed the request, you should file the combined paperwork in a folder labeled “Active ILL” by due date. Attach an ILL Checkout Slip with the due date you have calculated for your patron to the cover of the item. (Please avoid using non-

Keeping Track of it All Recommendations for Filing

removable tapes as these may damage another library's materials. For tips on attaching ILL Checkout Slips safely, see page 6.) Filing active ILL checkouts by due date (closer dates before later ones) allows you to easily determine if there are overdue ILL items as well as quickly find the paperwork for a returned item, which should have the due date you originally assigned on the ILL Checkout Slip.

RETURNS/COMPLETED ILL

Once a patron returns their interlibrary loan item to your library use the due date on the ILL Checkout slip to find the request paperwork in your "Active ILL" folder. Remove the ILL Checkout Slip from the item and put the lending library's paperwork which you filed back inside the item. Remember to keep the "Standard Request Form" and any other paperwork that your library generated for your own records, and return all of the lending library's paperwork with the item. If the lending library's paperwork has been lost, make a copy of the standard request form (marking out any sensitive patron information) to be returned with the item. **Please note: it is extremely important to copy the ILL number onto the standard request form as soon as you receive an item.** Not only does the 800# Service rely on the ILL# to requests, but the lending library will need it to properly process returned items. If you copy the ILL # to the standard request form, you will always have the number on hand, even after returning the item or if all other paperwork is lost.

Once the item has been packed and shipped back to the lending library, file the standard request form in a folder labeled "Completed ILL". You will want to keep paperwork for completed ILLs for *at least* 6 months in case there are any problems. If you need to track interlibrary loans for grant applications, keep your records until the relevant grant reports have been submitted.



Although the 800# Service is available to answer your questions regarding Interlibrary Loan, there are some questions that can only be answered through organization and attention at your own library. Remember, if an item is lent to your library from any lending library other than Anchorage Public Library, the 800# staff never sees it! The only way we'll know if requested materials arrive at or are returned from your library is if you tell us. Keeping 800# staff informed about your ILL activity not only ensures better communication with the library sharing their materials with your patrons, but also acts as a backup record that you can request information from later if something happens to your local paperwork.

This service is made possible
thanks to the support of

